# 1997-98 SESSION COMMITTEE HEARING RECORDS

# Committee Name: Joint Committee on Finance (JC-Fi)

## Sample:

Record of Comm. Proceedings ... RCP

- > 05hrAC-EdR\_RCP\_pt01a
- > 05hrAC-EdR\_RCP\_pt01b
- > 05hrAC-EdR\_RCP\_pt02

- > Appointments ... Appt
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- > Clearinghouse Rules ... CRule
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- > Committee Hearings ... CH
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- > Committee Reports ... CR
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- > Executive Sessions ... ES
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- Hearing Records ... HR
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- Miscellaneous ... Misc
- > 97hrJC-Fi\_Misc\_pt123b\_LFB
- Record of Comm. Proceedings ... RCP
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To: Joint Committee on Finance

From: Bob Lang, Director

Legislative Fiscal Bureau

#### **ISSUE**

**Budget Reductions: UW-Extension (UW System)** 

[LFB Summary: Page 626, #12]

#### **CURRENT LAW**

UW-Extension is divided into five major divisions: Cooperative Extension, Continuing Education Extension, Extension Communications and Information Technology, Business and Manufacturing Extension and Extension Education Administration and Services. Its 1996-97 base budget is \$143.4 million, of which \$49.5 million is GPR for general program operations.

#### **GOVERNOR**

Reduce the budget for UW-Extension by \$2,500,000 GPR annually, which represents a reduction of approximately 5% to Extension's base GPR budget. Although not specified in SB 77, the executive budget documents indicate that these reductions should be taken from the base funding levels for the divisions of Continuing Education, Extension Communications and Extension Education Administration and Services.

#### **DISCUSSION POINTS**

- 1. UW-Extension programming is divided into four divisions; their primary functions are as follows:
- a. Cooperative Extension. Has faculty based in Extension offices in each county and most campuses and centers to provide programs in four principal disciplines: agriculture and

agribusiness; community, natural resources and economic development; family living; and 4-H youth development.

- b. Continuing Education. Provides statewide programs in general education and funds programs that are offered at all of the UW System campuses and correspond to offerings in selected academic departments. Offerings include both non-credit programs to improve or develop professional or avocational skills and programs that may be applied toward academic degrees.
- c. Communications and Information Technology. Provides educational, informational and cultural programming via Wisconsin Public Radio and Wisconsin Public Television in partnership with the Educational Communications Board. Additionally, the Division is the central information systems support unit that coordinates equipment and network purchases and develops UWEX policies and procedures related to information technology.
- d. Business and Manufacturing Extension. Established in July, 1996, the division is responsible for the federally funded Small Business Development Center and some continuing education business programming. Prior to its establishment, these activities were included in the Division of Continuing Education.
- 2. The attachment outlines the 1995-96 expenditures by division and funding source. Cooperative Extension was allocated 45% of the GPR appropriated to UWEX, Continuing Education 31.5%, Extension Communications 13.4% and Administration 10.1%. Additionally, Cooperative Extension expended 83% of the federal funding and 100% of the local funding allocated to UWEX; whereas Continuing Education expended 77.3% of the program revenues received by UWEX in 1995-96. The Division of Business and Manufacturing was created as a separate entity in July, 1996; therefore, 1995-96 expenditures for this division would be included in the Division of Continuing Education.
- 3. According to the executive budget documents, Cooperative Extension, the Division of Business and Manufacturing and the Wisconsin Geological and Natural History Survey, which is attached to UWEX for administrative purposes, would be excluded from the UW-Extension budget reductions. Because these three divisions account for 45.5% of UWEX's 1996-97 GPR budget of \$49.5 million, the funding reductions for the remaining divisions would be 10% for Extension Administration and Services (-\$554,200 GPR annually) and 9.1% for both Continuing Education (-\$1,364,400 GPR annually) and Extension Communications (-\$581,400 annually). If these reductions would be taken equally across all of the programs within the affected divisions, it would translate into a 9.1% GPR reduction to Wisconsin Public Radio and Television as well as Continuing Education programs such as the collaborative nursing program and K-12 school partnerships.
- 4. Although the overall funding reduction is approximately 5% of GPR funding for UWEX, due to the level of GPR support for the exempted divisions, the reductions are

considerably higher for the affected divisions. Staff at DOA indicate that Cooperative Extension and the History Survey were exempted due to their inability to generate program revenues to offset GPR reductions, whereas Continuing Education could generate course fees and Extension Communications could generate public radio and television listener donations. Additionally, both Cooperative Extension and the Business programs were exempted because they rely on federal funding which could be affected by GPR reductions.

- 5. As part of UW System unallocated budget reductions in the 1995-97 budget, UW-Extension's GPR budget was reduced by \$897,300 GPR in 1995-96 and \$1,748,300 GPR in 1996-97. While both Continuing Education and Extension Communications could potentially generate revenues to offset the proposed GPR reductions, these divisions may not be able to generate sufficient revenues, given that they faced GPR reductions in the current biennium. Further, UWEX administration could be hampered because it does not have the ability to generate revenues.
- 6. Staff at UWEX indicate that GPR support is necessary to support the development of new initiatives that would not be able to generate revenues at the early stages of operation. If the proposed 9% to 10% reductions to the affected divisions are viewed as being excessive, the Committee could reduce the affected divisions by 5%, or \$1,350,000 GPR annually, and instruct the UW to allocate the remaining \$1,150,000 GPR annual reduction across the non-UWEX GPR appropriations. This would represent an approximate 0.2% annual reduction from the UW GPR adjusted base budget. Alternatively the Committee could reduce the affected UWEX divisions by 5% and restore the remaining \$1,150,000 GPR to UWEX.
- 7. On the other hand, it could be argued that these GPR budget reductions should be allocated across all divisions in UWEX. In March, 1997, UWEX released the results of a study on fee levels for non-credit courses which reported that participants in business programs would be willing to pay significantly higher fees for the courses offered through UWEX. Further, the April, 1997, Legislative Audit Bureau (LAB) report on UWEX indicated that Cooperative Extension programs may be able to more aggressively implement fees for programs that are now offered at no charge. The LAB cites efforts in Milwaukee and Waukesha Counties to generate program revenues to support Cooperative Extension programs. Arguably, both the divisions of Business and Manufacturing and Cooperative Extension could offset at least some portion of the GPR reductions with increases in program revenues. Further, under SB 77 several state agencies that do not have the ability to generate program revenue to offset the loss of GPR are facing GPR funding reductions. The Committee may wish to include all UWEX divisions in the \$2.5 million annual reduction and instruct UWEX to allocate reductions in these divisions in a manner that would minimize the impact on any local or federal funding.
- 8. The LAB audit raises several concerns regarding the programs of Continuing Education and Cooperative Extension, which were the focus of the report, including: (a) inconsistent fee policies for UWEX programs across the UW System; (b) inadequate reporting and evaluation practices; (c) duplication of services and a lack of coordination between UWEX,

the technical colleges and other governmental agencies; (d) an inefficient administrative structure which suggests that UWEX functions could be further allocated to individual campuses; (e) vague and general program missions that could include a vast array of services and goals, preventing UWEX from eliminating services when demand subsides; and (f) insufficient efforts to reach minority, elderly and low-income individuals.

- 9. The audit offers two specific recommendations, suggesting more detailed reporting requirements for both Continuing Education institutions and Cooperative Extension agents and specialists. In addition, the report suggests that the \$2.5 million annual budget reduction presents an appropriate time to examine the future funding and direction of UW-Extension. In her response to the LAB report, UW System President Lyall indicated that the UW concurs with the recommendation that UWEX expand its accountability and reporting efforts, and that UWEX would take responsibility for incorporating LAB's suggestions in this area. Further, President Lyall reported that she would propose to the UW Regents the creation of a three-member panel of outside experts in extension education to examine UWEX policies, conduct a review of the organization and mission of UWEX and identify options to meet the needs of the state.
- 10. In order to consider the results of this UW examination of its Extension programs and policies during the next biennial budget process, the Committee could require the UW to submit a report to the Governor, the Joint Committee on Audit and the Joint Committee on Finance by October 1, 1998, which outlines: (a) how the allocation of the \$2.5 million annual budget reduction was made in order to meet the concerns of the LAB report; (b) practices to improve accountability, reporting, coordination and administrative efficiency; (c) methods to establish a consistent fee policy and generate sufficient program revenue to offset reliance on state GPR; and (d) efforts to focus the mission of UW-Extension in order to avoid duplication of services, eliminate outdated services and extend UWEX programs to unreached populations.

#### ALTERNATIVES TO BILL

#### A. Allocation of the Reductions

1. Approve the Governor's recommendation, which would reduce the GPR budgets of the Divisions of Extension Administration and Services by approximately 10% and Extension Communications and Continuing Education by approximately 9.1% annually.

Modify the Governor's recommendation to specify that all UWEX Divisions, including Business and Manufacturing Extension, Cooperative Extension and Wisconsin Geological and Natural History Survey would be subject to the annual budget reduction. This would translate into an approximate 5% GPR reduction for each UWEX division. Provide that UWEX would have to allocate these reductions so as to minimize the effect on local and federal funds received by UWEX.

- Modify the Governor's recommendation to reduce UW-Extension's base GPR budget by \$1,350,000 GPR annually, which would represent a 5% reduction from the divisions of Continuing Education, Extension Communications and Extension Administration and Services. Allocate the remaining \$1,150,000 GPR annual reduction across the non-UWEX GPR appropriations (excluding debt service and utilities) of the UW System, which would represent a reduction of approximately 0.2%.
- 4. Modify the Governor's recommendation to reduce UW-Extension's base GPR budget by \$1,350,000 GPR annually, which would represent a 5% reduction from the divisions of Continuing Education, Extension Communications and Extension Administration and Services. Restore \$1,150,000 GPR annually to UWEX.

Alternative 4	GPR
1997-99 FUNDING (Change to Bill)	\$2,300,000

5. Delete the Governor's recommendation.

Alternative 5	<u>GPR</u>
1997-99 FUNDING (Change to Bill)	\$5,000,000

## Report on the Allocation of Reductions and Concerns of the Audit

Require the UW to submit a report to the Governor, Joint Committee on Audit and the Joint Committee on Finance by October 1, 1998. Specify that the report would have to include: (a) how the allocation of the annual UWEX budget reduction was made in order to meet the concerns of the LAB audit report; (b) practices to improve accountability, reporting, coordination and administrative efficiency; (c) methods to establish a consistent fee policy and generate sufficient program revenue to reduce reliance on state GPR; and (d) efforts to focus the mission of UW-Extension in order to avoid duplication of services, eliminate outdated services and extend UWEX programs to unreached populations.

2.	Take no action.	MO# Alt	61		/BURKE DECKER GEORGE	XX	N N N	A A A
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AMER 95

Restore Reductions in Funding for Wisconsin Public Radio

Motion:

Move to restore \$180,100 GPR annually to UW-Extension and specify that UW-Extension could not reduce the GPR base budget for Wisconsin Public Radio when determining the distribution of GPR funding reductions to UW-Extension required under SB 77.

Note:

Under SB 77, UW-Extension's base GPR budget would be reduced by \$2,500,000 GPR annually, which represents an approximate 5% reduction to the total base UWEX GPR budget. While not specified in SB 77, the Governor recommended in his executive budget documents that the reductions should be taken from the base budgets of the Divisions of Continuing Education, Extension Administration and Extension Communications, which includes UWEX's Wisconsin Public Radio operations. The Governor's budget documents indicate that the Division's of Cooperative Extension, Business and Manufacturing and the Wisconsin Geological and Natural History Survey would not be subject to the budget reductions.

The 1996-97 base GPR budget, including full compensation and fringe benefits, for Extension Communications is approximately \$6.4 million. Of this amount, Wisconsin Public Radio receives approximately \$1,979,000. UW-Extension has determined that Extension Administration's base GPR budget would be reduced by approximately 10% and Continuing Education's and Extension Communications' base GPR budgets would be reduced by approximately 9.1% in order to accomplish the \$2.5 million reduction. This would represent an approximate annual reduction of \$180,100 GPR to Wisconsin Public Radio.

This motion would restore the \$180,100 annual GPR funding reduction to Wisconsin Public Radio in UW-Extension.

COGGS

[Change to Bill: \$360,200 GPR]

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LEHMAN, M. Y N A
HARSDORF Y N A
ALBERS Y N A
GARD Y N A
KAUFERT Y N A

BURKE Y N A
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GEORGE Y N A
JAUCH Y N A
WINEKE Y N A
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Restore Reductions in Funding for UW-Extension Continuing Education

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Move to restore \$45,800 GPR annually to UW-Extension's Division of Continuing Education Extension.

Note:

The School for Workers, which is attached to UW-Extension's Division of Continuing Education Extension, offers employe training programs in new technologies, management theories and professional development for the work environment. The School was established in 1925 as a labor training program primarily for women entering the workforce; since World War II, its primary clients have been members and representatives of organized labor.

Under SB 77, UW-Extension's base GPR budget would be reduced by \$2,500,000 GPR annually, which represents an approximate 5% reduction to the total base GPR budget. While not specified in SB 77, the Governor recommended in his executive budget documents that the reductions be taken from the base budgets of the Divisions of Extension Administration, Extension Communications and Continuing Education which includes the School for Workers. The Division's of Cooperative Extension, Business and Manufacturing and the Wisconsin Geological and Natural History Survey would not be subject to the budget reductions.

The 1996-97 base GPR budget, including full compensation and fringe benefits, for Continuing Education Extension is approximately \$15 million. UW-Extension has determined that Extension Administration's base GPR budget would be reduced by approximately 10% and Continuing Education's and Extension Communications' base GPR budgets would be reduced by approximately 9.1% in order to accomplish the \$2.5 million reduction. This would represent an approximate annual reduction of \$45,800 GPR to the School for Workers.

This motion would restore the \$45,800 annual GPR funding reduction to the School for Workers in UW-Extension.

**2**BURKE / DECKER [Change to Bill: \$91,600 GPR] **GEORGE JENSEN** JAUCH LEHMAN, M. N Α WINEKE HARSDORF N SHIBILSKI **ALBERS** COWLES GARD **KAUFERT** Motion #2090 LINTON COGGS

#### UNIVERSITY OF WISCONSIN

## UW-Extension Funding Reduction 14-Day Passive Approval

#### Motion:

Move to require the UW to submit a report on how they would allocate the UWEX budget reductions in SB 77 subject to approval by the Joint Committee on Finance under a 14-day passive review process.

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#### **ATTACHMENT**

## 1995-96 UW-Extension Expenditures by Division

	<u>GPR</u>	PR	<u>FED</u>	County Funds	<u>Total</u>
Cooperative Extension Continuing Education	\$22,725,900 15,906,200	\$3,230,300 45,423,500	\$13,455,300 2,069,900	\$15,416,900 0	\$54,828,400 63,399,600
Extension Communications Extension Administration	6,776,600	7,983,100	187,500	0	14,947,200
and Services	5,092,500	2,155,000	507,500	0	7,755,000
	\$50,501,200	\$58,791,900	\$16,220,200	\$15,416,900	\$140,930,200

## Percent Share of Total UWEX Funding Received by Each Division

	<u>GPR</u>	PR	FED	County Funds	Total
Cooperative Extension Continuing Education Extension Communications	45.0% 31.5 13.4	5.5% 77.3 13.6	83.0% 12.8 1.2	100.0% 0.0 0.0	38.9% 45.0 10.6
Extension Administration and Services	10.1	<u>3.7</u>	3.1	0.0	5.5
	100.0%	100.0%	100.0%	100.0%	100.0%

## Funding Source Percentage Within Each Division

	<u>GPR</u>	<u>PR</u>	<u>FED</u>	County Funds	Total
Cooperative Extension Continuing Education Extension Communications Extension Administration	41.4% 25.1 45.3	5.9% 71.6 53.4	24.5% 3.3 1.3	28.1% 0.0 0.0	100.0% 100.0 100.0
and Services	65.7	27.8	6.5	0.0	100.0



To:

Joint Committee on Finance

From:

Bob Lang, Director

Legislative Fiscal Bureau

#### **ISSUE**

UW-Extension Credit Outreach Spending and Position Authority (UW System)

[LFB Summary: Page 626, #13]

#### **CURRENT LAW**

Academic student fees generated through UW-Extension (UWEX) credit outreach instruction are deposited into the UW System academic student fees annual appropriation, which includes most tuition and student fees systemwide. The 1996-97 base appropriation for academic student fees is \$392,458,500, of which \$7,693,600 is from UWEX credit outreach instruction.

Agency expenditure authority for annual program revenue appropriations, excluding those funded by auxiliary enterprises, general operations receipts which includes revenues from UWEX non-credit courses, gifts and grants and all federal appropriations, is set by the level appropriated by the Legislature unless additional spending authority is approved by the Secretary of Administration with the concurrence of the Joint Committee on Finance.

Positions funded by program revenue, except for those supported by auxiliary enterprises, general operations receipts, gifts and grants, federal aids and federal indirect cost reimbursements, may be approved either by enactment of legislation or by the Secretary of Administration subject to the approval of the Joint Committee on Finance.

#### **GOVERNOR**

Create a continuing, PR appropriation for Extension credit outreach student fees. Authorize the Board of Regents to create or abolish full or partial FTE positions funded through revenues received in this appropriation. Transfer \$7,918,600 PR annually from the appropriation

for degree credit instruction to the Extension credit outreach student fees appropriations. Delete 46.17 GPR positions, currently funded by the GPR appropriation for UW general program operations, and provide 46.17 PR positions in the Extension student fees appropriation. Specify that the current academic student fees appropriation would no longer receive funds for credit outreach instruction sponsored by Extension.

#### **DISCUSSION POINTS**

- 1. In general, agencies can receive position and expenditure authorization through the budget bill or in separate legislation or from the Joint Committee on Finance under s.13.10 or s.16.505/515 of the statutes. In addition, the UW System can expend all revenues received and create positions for certain appropriations, if they are funded by federal revenue or program revenue for auxiliary enterprises, non-tuition general operations receipts and gifts and grants.
- 2. Currently, the Legislature has fiscal oversight over expenditures of student tuition and fees (excluding noncredit courses) through its authority to approve positions and funding under the academic student fees appropriation. This appropriation includes Extension credit outreach courses. However, this large appropriation does not enable the Legislature to separate out Extension credit outreach programs when determining the overall level of expenditure authority.
- 3. Staff at UW-Extension argue that the credit outreach program appropriation should receive the same level of flexibility as the appropriation which governs program revenues for non-credit programs. Under this appropriation, UWEX can expend all revenues received and create or abolish positions. UWEX indicates that this flexibility would enable their staff to more rapidly respond to demand for courses and more accurately budget across programs and fiscal years, thus limiting the accumulation of deficits or balances at campuses.
- 4. However, an argument can be made that legislative oversight should be retained over the credit outreach programs, because students receive credit toward a degree for these courses and the course fees are comparable to the tuition charged for general UW degree program courses. Currently, the Legislature sets the overall level of tuition expenditures for UW programs and it may be desirable to maintain this authority. Further, in 1995-96, credit outreach courses accounted for only 7% of all UWEX continuing education course enrollments; arguably, the current flexibility granted to UWEX for non-credit programs would be sufficient to respond quickly to program demand and promote efficient budgeting control.
- 5. The University argues that the state's control over positions and expenditures for Extension credit outreach programs is administratively burdensome and time consuming under s. 16.505/515. However, under the current process, the Joint Committee on Finance only has 14 working days in which to schedule a meeting on requests approved by DOA and forwarded to the Committee. If the delays are attributable to the earlier consideration of the request at DOA

or UW System Administration, it is unclear why the Legislature should curtail its oversight of these PR expenditures and positions.

- 6. Legislative oversight of PR spending and positions has been viewed as basic to the budget process because: (a) program revenue and positions often have potential GPR effects; (b) it is difficult to evaluate the position needs of an agency without considering total personnel levels; (c) legislative oversight of programs can be compromised when funding and position authorizations are not subject to prior review; and (d) program revenue appropriations are often funded with fees over which the Legislature would otherwise have little oversight.
- 7. SB 77 would convert 46.17 GPR positions to PR positions. Staff at UWEX indicate that this is a technical change because these positions, like most UW positions, are currently funded through both GPR and student tuition and fees.
- 8. A correction would be needed to transfer the correct amount of program revenue expenditure authority into the proposed appropriation. Staff at the UW indicate that \$200,000 PR attributable to UW-Extension's share of the student application fee revenue as well as \$25,000 PR budgeted by UW System for each of the campuses and UWEX for an internal auditor should not be transferred to the proposed extension student fees appropriation.

#### ALTERNATIVES TO BILL

- 1. Approve the Governor's recommendation with a correction that would reduce the amount of funding transferred to the separate appropriation by \$225,000 PR annually.
- Modify the Governor's recommendation to create an annual appropriation, rather than a continuing appropriation and delete the authority to create or abolish positions funded through this new appropriation. Reduce the amount of funding transferred to the separate appropriation by \$225,000 PR annually as a correction to the bill.
  - 3. Delete the Governor's recommendation.

	Alternative 3 1998-99 POSITIONS (Change	to Bill)	<b>GPR</b> 46.17	<u>PR</u> - 46.17	<u>TOTAL</u> 0.00			
Prepared by:	Ruth Hardy	MO# A H	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	A A A A A A	BURKE DECKER GEORGE JAUCH WINEKE SHIBILSKI COWLES PANZER  AYE NO	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	N N N N N N	AAAAAA

To: Joint Committee on Finance

From: Bob Lang, Director

Legislative Fiscal Bureau

#### **ISSUE**

Kohl Center Position and Expenditure Authority: UW-Madison Athletics (UW System)

#### **CURRENT LAW**

The UW Athletics Board approves the Intercollegiate Athletics Department annual budget in March of each year. Following approval of the UW Board of Regents, UW System forwards the athletics allotment request, under s. 16.515, to the Department of Administration (DOA) no later than December of the fiscal year for which the request is being made. DOA then reviews the request and forwards its recommendations to the Joint Committee on Finance which reviews the request under a 14-day passive review.

#### **GOVERNOR**

No provision.

#### **DISCUSSION POINTS**

- 1. UW-Madison Intercollegiate Athletics has indicated that in order to expedite the start-up operations of the Kohl Center Athletic Arena, they would need \$568,200 PR in 1997-98 and \$765,000 PR in 1998-99 and 15.0 PR positions beginning in 1997-98. These positions include the management and facilities maintenance staff for the Kohl Center, which will begin operations in January, 1998.
- 2. Staff at UW-Madison indicate that these positions were not requested under the budget request process in the fall of 1996 because an analysis of the staffing needs for the Kohl

Center had not yet been completed. The Athletics Board has approved this request, and UW is seeking legislative approval for these positions and funding at this time because the UW-Madison Athletics annual budget approval process in December, 1997 would not provide UW Athletics sufficient time to hire positions and begin operations in January, 1998. Staff at UW-Madison indicate that if this request would not be approved during budget deliberations, the UW System would make this request under s. 16.515 in the summer of 1997.

3. UW Athletics would utilize existing staff members, part-time student employes and temporary contract employes as well as these requested positions to staff the Kohl Center operations. Given the magnitude of duties associated with operating this type of facility, the request for 15 additional positions and related funding appears reasonable.

#### ALTERNATIVES TO BILL

1.) Provide \$568,200 PR in 1997-98 and \$765,000 PR in 1998-99 and 15.0 PR positions beginning in 1997-98 for the management and facilities maintenance operations of the UW-Madison Kohl Center Athletic Arena.

Alternative 1	<u>PR</u>
1997-99 FUNDING (Change to Bill)	\$1,333,200
1998-99 POSITIONS (Change to Bill)	15.00

2. Maintain current law. **ZJENSEN** LEHMAN, M. HARSDORF **ALBERS KAUFERT** LINTON Prepared by: Ruth Hardy COGGS BURKE DECKER GEORGE JAUCH WINEKE SHIBILSKI COWLES PANZER AYE O NO ABS To:

Joint Committee on Finance

From:

Bob Lang, Director

Legislative Fiscal Bureau

#### **ISSUE**

#### Depreciation Offset for General Purpose Revenue Funds (UW System)

#### **CURRENT LAW**

Depreciation costs for instructional buildings represent part of the costs which are funded through GPR and tuition. The UW System's GPR budget was last adjusted in 1995-97 to reflect revenue from depreciation charges.

#### **GOVERNOR**

No provision.

#### **DISCUSSION POINTS**

- 1. In the UW System, instructional costs are shared between GPR (65%) and tuition (35%). The Board of Regents sets tuition based on a calculation of total instructional costs which include direct and indirect costs.
- 2. Because debt service is funded solely through GPR, students do not share in these costs, even for instructional facilities. Therefore, a depreciation charge for new buildings is included in total instructional costs, and thus, in the calculation of tuition. The total depreciation charge, which is based on the expected useful life of an instructional building, is equal to 3.5% of the value of new facilities. The 35% student share of instructional costs is then applied to the total depreciation charge.

- 3. In each biennium, as new buildings are completed, the depreciation charge generates additional tuition revenues for the University. Because these funds are not set aside for depreciation-related items such as building maintenance, these revenues represent an increase in the UW's budget.
- 4. The tuition revenues generated by the depreciation charge are taken as a direct GPR offset to instructional funding because the costs of depreciation are not included in the University's operating budget.
- 5. While a charge for depreciation will be assessed to students in the 1997-99 biennium, the bill does not include additional tuition revenues which will be generated from such a charge, nor have such funds been used to offset GPR. Since the charge to students is intended to be a GPR offset, it would be appropriate to reduce the GPR instructional budget for the UW by an equal amount. This type of adjustment has been made in each biennial budget since 1983-85.
- 6. The estimated value of the new instructional buildings expected to come on line in the 1997-99 biennium is \$11,219,000 in 1997-98 and \$6,500,000 in 1998-99. This increased value will generate additional tuition revenues of approximately \$137,400 in 1997-98 and \$217,000 in 1998-99. Consequently, an equivalent amount of GPR can be deleted from the University's budget.

#### MODIFICATION TO BILL

Reduce the University's budget by \$137,400 GPR in 1997-98 and \$217,000 GPR in 1998-99 and provide \$137,400 PR in 1997-98 and \$217,000 PR in 1998-99 to reflect the application of revenues to be received in 1997-99 from depreciation charges assessed to students.

Modification	<u>GPR</u>	<u>PR</u>	TOTAL
1997-99 FUNDING (Change to Bill)	- \$354,400	\$354,400	\$0

Prepared by: Merry Larsen

MO# Modulation S

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To:

Joint Committee on Finance

From:

Bob Lang, Director

Legislative Fiscal Bureau

#### **ISSUE**

Minor Policy and Technical Changes (UW System)

# A. FUNDING TRANSFER RELATED TO UW HOSPITAL AND CLINICS AUTHORITY

#### Governor

No provision.

#### Modification to Bill

Transfer \$9,400 GPR annually from the UW appropriation for general program operations to the UW appropriation for services received from the UW Hospital and Clinics Authority (UWHCA).

**Explanation:** This modification would transfer funding that was inadvertently left in general program operations supplies and services at the time of the creation of the UWHCA on June 30, 1996.

#### B. ADJUSTMENT TO UTILITIES REESTIMATE

[LFB Summary: Page 622, #4]

#### Governor

Reestimate the cost of utilities by -\$369,100 GPR and \$84,500 PR in 1997-98 and \$375,700 GPR and \$169,900 PR in 1998-99.

#### Modification to Bill

Reduce the appropriation for auxiliary enterprises by \$84,500 PR in 1997-98 and \$169,900 PR in 1998-99 and adjust the University's appropriation for tuition revenues by -\$99,700 PR in 1997-98 and \$158,200 PR in 1998-99. In addition, provide a net amount of \$99,700 GPR in 1997-98 and \$52,000 GPR in 1998-99 for increased utilities costs.

**Explanation:** Utilities costs are funded through a combination of GPR and PR tuition and fee revenues. In general, utility costs are paid out of a GPR fuel and utilities appropriation. The payment of the 27% tuition share of utility costs is accomplished by increasing the PR tuition appropriation and making a corresponding decrease in the GPR general program operations appropriation. In this way, when all three appropriations are considered, 27% of the fuel and utility costs are paid from PR and 73% from GPR.

This modification would reverse an adjustment of the PR costs which was inadvertently made to the University's PR appropriation for auxiliary enterprises, rather than the PR appropriation for tuition and fees. In addition, this modification provides additional GPR funding in 1998-99, to reflect increased utilities costs due to new facilities which will be completed in 1997-98, which were inadvertently excluded for 1998-99. Finally, adjustments are made to the GPR general program operations and to the PR tuition and fees appropriations to establish the proper 73%/27% split of these fuel and utility costs.

Modification	<u>GPR</u>	PR	TOTAL
1997-99 FUNDING (Change to Bill)	\$151,700	- \$195,900	- \$44,200

#### C. UW-MADISON INTERCOLLEGIATE ATHLETICS

[LFB Summary: Page 628, #20]

#### Governor

Provide \$1,598,800 PR in 1997-98 and \$2,238,100 PR in 1998-99 for classified and unclassified salaries, fringe benefits, and supplies and services. This program revenue for

athletics auxiliary enterprises is generated primarily from athletic event ticket sales, radio and television contracts, NCAA revenue sharing, marketing, promotions, licensing and concessions.

#### Modification to Bill

Delete \$976,200 PR annually from athletics auxiliary enterprises.

**Explanation:** The funding in the bill would represent a duplication of funding already received by UW Athletics in February, 1997, under s. 16.515. This funding was included in the Governor's budget, because at the time of submission, the 16.515 request had not yet been approved.

Modification	PR
1997-99 FUNDING (Change to Bill)	- \$1,952,400

Prepared by: Ruth Hardy and Merry Larsen

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#### **UW SYSTEM**

UW-Oshkosh Project Success--Allocate Funding and Positions

#### Motion:

Move to require the Board of Regents to allocate \$125,000 GPR and 2.0 GPR positions in each year of the 1997-99 biennium from base resources within the UW System's general program operations appropriation to increase the number of students served by the project success program at UW-Oshkosh from 55 students to 77 students.

#### Note:

This motion would require the Board of Regents to allocate \$125,000 GPR in each year of the 1997-99 biennium from its general program operations appropriation to UW-Oshkosh for the expansion of the project success program which serves students with learning disabilities. In addition, this motion would require the UW System to allocate 2.0 GPR positions annually for one faculty member and one support staff member for the project success program.

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#### **UW-Madison Minority Business Expenditures**

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Move to reduce UW-Madison's supplies and expenses budget by \$4,227,200 GPR and \$2,276,200 PR in 1997-98.

Note:

This motion would provide a one-time reduction to UW-Madison's supplies and services budget in the amount by which UW-Madison purchases in 1995-96 fell short of the statutory goal that state agencies attempt to ensure at least 5% of the amounts expended for purchasing goods and services were paid to minority businesses. In 1995-96, UW-Madison expended approximately \$150.5 million for goods and services procurements, of which approximately \$1 million or 0.68%, was paid to designated minority-owned businesses. This motion would reduce the UW-Madison's supplies and services budget by 4.32% of the amount expended on procurements in 1995-96, or the difference between the 5% minority business goal and the actual percentage achieved by UW-Madison in 1995-96. The reduction is calculated using a 65% GPR and 35% program revenue from tuition.

[Change to Bill: -\$4,227,200 GPR and -\$2,276,200 PR]

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#### Precollege Follow-Through Program

Motion:

Move to provide \$119,400 GPR and \$64,100 PR in 1997-98 and \$173,300 GPR and \$93,200 PR in 1998-99 to expand precollege programs for minority and disadvantaged students.

Note:

This motion would provide \$119,400 GPR and \$64,100 PR in 1997-98 and \$173,300 GPR and \$93,200 PR in 1998-99 to expand precollege programs for minority and disadvantaged students. The additional funding was requested by the University in its 1997-99 budget request but was not included in SB 77.

[Change to Bill: \$292,700 GPR and \$157,300 PR]

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## Lawton Grant and Advanced Opportunity Programs

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Move to provide \$200,000 GPR in 1997-98 and \$400,000 GPR in	1998-99 to increase
funding for the Lawton undergraduate minority retention grant program. ]	In addition, provide
\$133,300 GPR in 1997-98 and \$266,700 GPR in 1998-99 for the advanced of	pportunity program.

Note:

This motion would increase funding for the Lawton undergraduate minority retention grant program by \$200,000 GPR in 1997-98 and \$400,000 GPR in 1998-99 over the base level of \$2,006,900. The program provides grants to minority and economically disadvantaged graduate students.

In addition, this motion would increase funding for the advanced opportunity program by \$133,300 GPR in 1997-98 and \$266,700 GPR in 1998-99 over the base level of \$3,798,800. This program provides grants to minority and economically disadvantaged students.

[Change to Bill: \$1,000,000 GPR]

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Motion #1629

#### Libraries--50% of Request

Motion:

Move to provide \$162,500 GPR and \$87,500 PR in 1997-98 and \$1,529,300 GPR and \$823,400 PR in 1998-99 to increase funding for: (a) library acquisitions; (b) systemwide licenses to databases, reference services and full-text journal articles; and (c) document delivery service among UW institutions.

Note:

This motion would provide a total of \$250,000 in 1997-98 and \$2,352,700 in 1998-99 through a combination of GPR and PR tuition revenues to increase funding for library acquisitions and services. The additional funding in this motion would provide 50% of the funding requested by the UW System in its 1997-99 budget request, but not included in SB 77.

[Change to Bill: \$1,691,800 GPR and \$910,900 PR]

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#### **UW SYSTEM**

## UW-Stout Graphics Communications Management Program

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Move to provide \$250,000 GPR annually in a new, annual appropriation to match private funds provided for the graphics communications management program at UW-Stout. Prohibit the University from expending any amount from this appropriation exceeding the amount provided for the program from private sources.

Note:

This motion would provide \$250,000 GPR annually in a new, annual appropriation within the University's budget for the UW-Stout graphics communications management program. The motion would prohibit the University from expending monies from this appropriation unless matched by an equal amount of funds from private sources.

[Change to Bill: \$500,000 GPR]

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# MEDICAL COLLEGE OF WISCONSIN AND THE UNIVERSITY OF WISCONSIN SYSTEM

#### Area Health Education Centers

Motion:

Move to increase funding for Area Health Education Centers (AHECs) under the Medical College of Wisconsin (MCW) by \$125,000 GPR in 1997-98 and \$150,000 GPR in 1998-99 and under the University of Wisconsin (UW) System by \$122,300 GPR in 1997-98 and \$147,300 GPR in 1998-99.

Note:

In 1996-97, a total of \$500,000 GPR is appropriated for AHECs, with \$250,000 GPR under both MCW and the UW System. AHECs are regional centers designed to improve access to primary care health services in underserved rural and inner-city areas. The AHECs provide both access to health care for low-income citizens and community-based primary care training programs for medical, nursing, dentistry, allied health and pharmacy students. The regional AHECs each serve a specific geographic region of the state, including northern, southwestern, eastern and the Milwaukee area. At the state level, the AHEC system is jointly administered by MCW and the UW Medical School.

Funding for AHECs is provided by federal, state and local governments, as well as private and community resources. The federal government provides start-up funding for six years to each regional center. Federal funds increase each year for three years and then decrease. State, local and private funding is supposed to provide a 25% match to federal funding during start-up and then replace all federal funding by the end of the six years. Seventy percent of the total AHEC funding is currently allocated to programs in the four regional AHECs and 30% is allocated to MCW and the UW Medical School for system activities.

The Wisconsin AHEC system has received two successive three-year federal grants, the second of which will expire on September 30, 1997. The Wisconsin AHEC system is applying for its third federal grant and must document the level of state and local matching funds. If awarded, the federal grant to Wisconsin could total approximately \$3.5 million. Both the

Northern and Milwaukee area AHECs will have reached the end of the six-year start-up period by 1998-99 and will no longer qualify for federal funding.

Under the bill, funding under the UW System for AHECs would increase by \$2,700 GPR annually due to state agency standard budget adjustments, which would increase the UW AHEC appropriation to \$252,700 annually. Funding for AHECs under MCW would remain at the 1996-97 base level. This motion would increase the amount appropriated under both UW and MCW for AHECs to \$375,000 GPR in 1997-98 and \$400,000 GPR in 1998-99.

[Change to Bill: \$544,600 GPR]

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#### Vehicle Fleet Costs

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Move to reduce the UW System appropriations which fund the costs of the University's fleet of vehicles by \$112,700 GPR and \$60,700 PR in 1997-98 and \$225,400 GPR and \$121,400 PR in 1998-99.

Note:

The UW System currently has a fleet of 303 vehicles. For the 1995 calendar year, the cost per mile for the UW vehicles was \$0.231, while the cost per mile for vehicles in DOA's fleet was \$0.172. This motion would reduce the appropriations from which costs associated with the UW's fleet are paid by an amount equal to the difference between the University's cost per mile and those of DOA. The appropriations are reduced by half of this amount in the first year of the biennium to reflect the time which may be required to implement changes to the University's fleet operations to realize the required cost savings. This motion splits the UW's fleet costs between GPR and PR tuition and fee revenues 65%/35%.

[Change to Bill: -\$338,100 GPR and -\$182,100 PR]

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#### **UW SYSTEM**

## **Budget Reduction**

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Move to reduce the UW System's general program operations appropriation for System administration by \$171,400 GPR annually.

Note:

This motion would reduce the University's general program operations appropriation for UW System Administration by \$171,400 GPR annually. This would represent an annual 2% reduction to the adjusted base funding for the appropriation (\$8,567,500).

[Change to Bill: -\$342,800 GPR]

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#### **UW SYSTEM**

#### Segregated Revenue Position Authority

Motion:

Move to permit the UW System to create or abolish positions funded through the University's trust fund income appropriation (s. 20.285 (1)(u)) without prior approval. Require the Board of Regents to submit a quarterly report to the Department of Administration and the Joint Committee on Finance concerning the number of full-time equivalent positions funded from this appropriation, which were created or abolished during the preceding calendar quarter.

Note:

Under current law, the Board of Regents may create or abolish positions funded from the University's appropriations for: auxiliary enterprises; general operations receipts; gifts and donations; federal aid; and federal indirect cost reimbursement. The Board is required to submit a quarterly report to DOA and JFC concerning the number of full-time equivalent positions funded from these appropriations which were created or abolished during the preceding calendar quarter and the source of funding for each such position. The creation or elimination of positions funded through the University's other appropriations must be approved by the Governor and Legislature under s. 13.10 or s. 16.505 of the statutes.

This motion would allow the UW System to create or abolish positions funded from the University's trust fund income appropriation and require that any positions funded from this appropriation which are created or abolished be included in the Board's quarterly position report to DOA and JFC.

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#### **Tuition Subsidy Statement**

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Move to require that, beginning in the 1997-98 academic year, student fee statements include the following statement: "The Legislature and the Governor have authorized \$\_\_\_\_\_ of state funds for the University of Wisconsin System and its students during the \_\_\_\_\_ academic year. This is a tuition subsidy of \$\_\_\_\_\_ per student from the taxpayers of Wisconsin." Require that the amount of state funds shown in the statement be equal to the total amount of GPR budgeted for the UW System in that year, and that the amount representing the per student subsidy be calculated by dividing the total GPR amount by the number of full-time equivalent students enrolled for the most recent fall semester.

Note:

This motion would require the University to print, on all student fee statements, a statement regarding the amount of GPR appropriated for the UW System in the current year and the result obtained by dividing that figure by the number of FTE students enrolled the most recent fall enrollment figure.

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#### **UW SYSTEM**

#### **Tuition Remissions**

Motion:

Move to require the Board of Regents to remit tuition and fees, in whole or in part, for resident graduate students who are fellows or who are employed within the UW System as faculty, instructional academic staff or assistants with an appointment equal to at least 33% of a full-time equivalent position.

Note:

Under current law, the Board of Regents may remit nonresident tuition to graduate students with at least one-third teaching, research or project assistantships. In addition, the Board may remit nonresident tuition, within limits established by statute, for: needy and worthy students on the basis of merit; students who are deserving of relief due to extraordinary circumstances; and worthy and needy foreign students or U.W. citizens whose residence is not in the U.S.. The Board may also remit both resident and nonresident tuition as part of athletic scholarships.

This motion would require the Board of Regents to remit resident tuition to graduate students with at least one-third teaching, research or project assistantships.

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## UW System Transit Needs Study

Motion:

Move to require the UW System to conduct a study of transit needs and how to maximize the use of transit services for students, faculty and staff. The study shall be completed by December 31, 1998, and shall be conducted to the extent possible with the transit operators serving the major UW campuses (Madison, Milwaukee, Green Bay, Oshkosh, LaCrosse, Eau Claire, Parkside and Stevens Point). The study shall compare the cost of constructing new parking facilities versus using transit services. The study shall explore what strategies or incentives will increase transit use and are cost-effective compared to providing more parking. The recommendations shall be systemwide as well as campus specific.

Note:

This motion would require a study by the UW System of its transit needs.

LEHMAN, M. HARSDORF ALBERS GARD **KAUFERT** LINTON COGGS **ZBURKE** DECKER GEORGE JAUCH WINEKE SHIBILSKI **COWLES** PANZER AYE 12 NO 4

#### **UW SYSTEM**

#### Report on Management to Staff Ratio

Motion:

Move to require the Board of Regents to develop definitions of the terms "manager" and "staff member" and to categorize each position in the UW System, including all UW System institutions, UW-Extension and the UW Center System, as either a manager or a staff member. Require that the Board submit a report, by January 1, 1998, and annually thereafter, to the Joint Committee on Finance, which includes: (a) the proposed definitions; (b) a list of the UW System position titles in each category; (c) the criteria used to determine the category into which a position is placed; and (d) the current number of authorized positions in each category.

Note:

This motion would establish an annual reporting requirement on the management to staff ratio at the UW System.

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#### Advising Initiative

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Move to provide \$650,000 GPR and \$350,000 PR and 25.0 GPR positions beginning in 1997-98 and \$1,950,000 GPR and \$1,050,000 PR and an additional 35.0 GPR positions beginning in 1998-99 to improve academic and career advising efforts.

Note:

This motion would provide \$650,000 GPR and \$350,000 PR and 25.0 GPR positions beginning in 1997-98 and \$1,950,000 GPR and \$1,050,000 PR and an additional 35.0 GPR positions beginning in 1998-99 for improvements in academic and career advising efforts. The additional funding was requested by the University in its 1997-99 budget request but was not included in SB 77.

[Change to Bill: \$2,600,000 GPR and 60.0 GPR positions, \$1,400,000 PR]

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## LFB Summary Items for Which No Issue Papers Have Been Prepared

	MO#		<u> 225</u>	
<u>Item #</u>	<u>Title</u>	ZJENSEN LEHMAN, M. HARSDORF	X N X N	1
1 6 11	Standard Budget Adjustments Expenditure Authority for Special Fee Revenues Application Fees	ALBERS GARD KAUFERT LINTON COGGS	X N N N N N N N N N N N N N N N N N N N	# # #
) 14 16 17	UW-Extension Revenues from Non-Credit Courses Reestimate Auxiliary Operations Reestimate Gifts and Trust funds	/ BURKE DECKER	A N	P
18 19 21	Reestimate General Operating Receipts State Laboratory of Hygiene Services to the UW Hospitals and Clinics Authority	GEORGE JAUCH WINEKE SHIBILSKI COWLES	Y N Y N Y N	A A A
25	Tuition and Award Program	PANZER  AYE	y N y N	A S

## LFB Summary Items to be Addressed in Subsequent Paper:

Item #	<u>Title</u>
3	Debt Service Reestimate
15	Transfer Recycling Market Development Board to Commerce

## LFB Summary Items for Introduction as Separate Legislation

Item #	<u>Title</u>
22	Hiring Authority for Classified, Nonprofessional Positions
23	Promotional Appointments to Classified Positions